



# Electronic Signature Design Overview

CalFresh Learning Collaborative  
6/14/17-6/15/17



# Electronic Signature

The goal was to identify a solution that adequately meets the various applicants needs for CalFresh, CalWORKs and Medi-Cal.

This solution would enable customers to apply over the phone and capture a digital signature through the following three options:

## SMS Texts

## Email

## IVR





# Electronic Signature Pages

Existing functionality for capturing a signature using the “Check to Sign” option is still available for workers. This has been enhanced to allow for a second parent signature if applicable to the form being completed.

### Electronic Signature

**\*- Indicates required fields**

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

**Language: \***

Generate Form

**Signature Method: \***

**Number of Signatures:**

**Worker Name:**

**Worker ID:**

Check to Sign

2

Bruce Wayne

36ZZ0090ZZ

**\* I declare under penalty of perjury under the laws of the United States of America and the State of California that the information contained in this statement of facts is true, correct and complete.**

Person *	Date Of Birth	Check to Sign *
Thelma Louise	01/01/1991	<input checked="" type="checkbox"/>
Doogie Howser	12/05/1973	<input checked="" type="checkbox"/>

Please select the name of the person signing, click the above checkbox, and then click the **Save** button to electronically sign the document.

Save

Cancel



# Electronic Signature Pages

A second capture method has been created to allow the electronic signature to be captured using Email, Text or IVR. This method also allows for a second parent signature if applicable to the form being completed.

## Electronic Signature

\*- Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: \*

Generate Form

Signature Method: \*

CW/CF e-Sign

Number of Signatures:

2

Worker Name:

Bruce Wayne

Worker ID:

36ZZ0090ZZ

Person *	Date Of Birth	Signature Capture Type *	Value	Status
Thelma Louise	01/01/1991	E-mail	ThelmaLou@gmail.com	Not Sent
Doogie Howser	12/05/1973	E-mail	TeachMeHow2Doogie@gmail.com	Not Sent

Save

Cancel



# Electronic Signature Pages

## Electronic Signature

\*- Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: \*

Signature Method: \*

Number of Signatures:

Worker Name:

Bruce Wayne

Worker ID:

36ZZ0090ZZ

<input type="checkbox"/> Person *	Date Of Birth	Signature Capture Type *	Value	Status	
<input type="checkbox"/> Thelma Louise	01/01/1991	<input type="text" value="E-mail"/>	ThelmaLou@gmail.com	Sent	<input type="button" value="Resend"/>
<input type="checkbox"/> Doogie Howser	12/05/1973	<input type="text" value="E-mail"/>	TeachMeHow2Doogie@gmail.com	Sent	<input type="button" value="Resend"/>

### ▼ Signature History

Thelma Louise

Date/Time	Signature Capture Type	Value	Status	Expiration Date
03/01/2017 09:59 AM	E-mail	ThelmaLou@gmail.com	Sent	03/04/2017

Doogie Howser

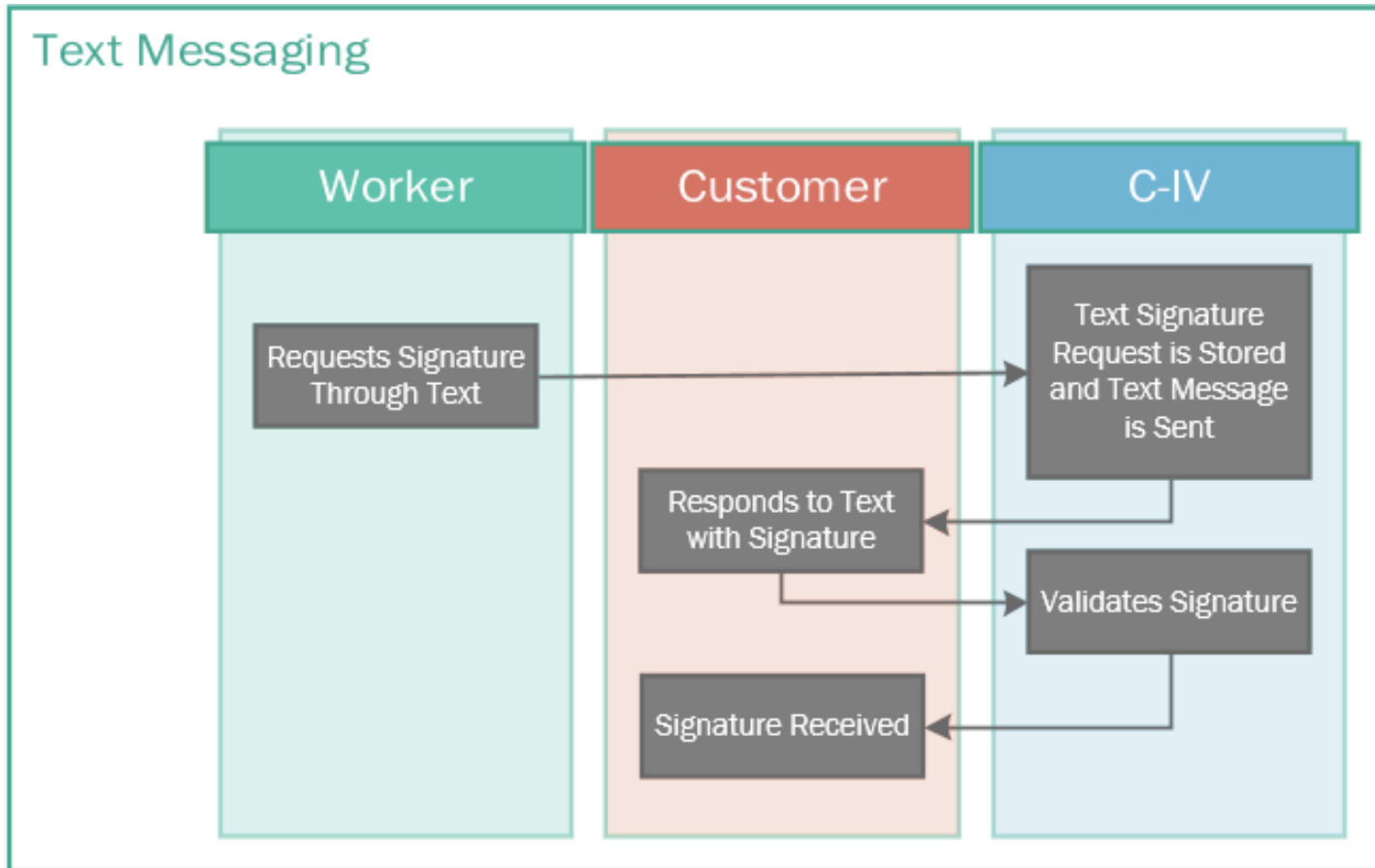
Date/Time	Signature Capture Type	Value	Status	Expiration Date
03/01/2017 09:59 AM	E-mail	TeachMeHow2Doogie@gmail.com	Sent	03/04/2017

- A complete signature history is maintained for each person
- A signature request can be resent at any time.
- Signature capture type can be changed and the signature request resent.



## Electronic Signature - Text

The C-IV System will send a text message to the phone number associated to the person with a message requesting a response from the Customer. The Customer will need to respond within 3 days.





# Electronic Signature - Text

Text Messaging will be sent in English or Spanish

## C4Yourself Text

To complete the electronic signature process, reply with {capture code}. This code will expire in 3 days.

Questions? (844) 859-2100

## C4Yourself Text

Para completar el proceso de firma electronica, respondiendo con {capture code}. Este codigo expirara en 3 dias.

Preguntas? (844) 859-2100

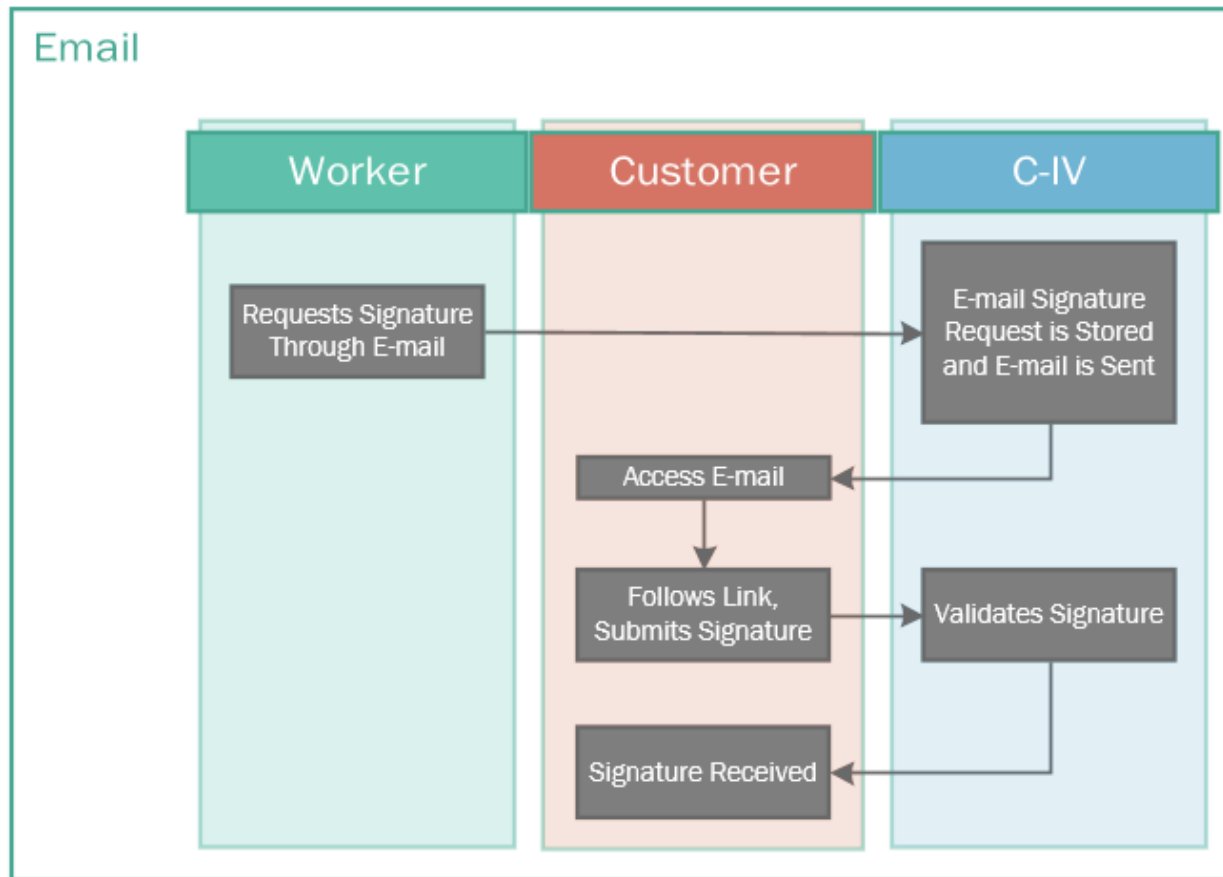
- The capture code will be a unique code.
- Customers will receive reminder text 1 day after the first message is sent if the process has not been completed.
- An Auto-Journal will be completed when a signature is requested, received, expired cancelled, a reminder is sent or text message is undeliverable.
- A Task will be created for the worker who generated the signature request when a signature request is received, email is undeliverable or expired.\*

\*Note: The task will not be generated until the county admin set the automated action to active.



# Electronic Signature - Email

The C-IV System will send an email to the email address associated to the person with a unique URL/Web Link. The customer will access the URL and complete the signature using their email address and date of birth. The Customer will need to respond within 3 days.





# Electronic Signature - Email

Email will be sent in English or Spanish. The link in the email will direct the customer to a C4yourself.com web page available in all threshold languages.

- Customers are not required to have a C4yourself Account to use the email functionality
- Customers will receive a reminder email 1 day after the first email is sent if the process has not been completed.
- An Auto-Journal will be completed when a signature is requested, received, expired cancelled, a reminder is sent or email is undeliverable.
- A Task will be created for the worker who generated the signature request when a signature request is received, email is undeliverable or expired.\*

The screenshot shows the C4Yourself website interface. At the top, there's a header with the C4Yourself logo, the tagline "Access to Benefits. Simplified.", and a language selector set to "English" with a "Change Language" button. Below the header, the page title is "Electronic Signature". The main content area contains a message: "Please fill in the E-mail Address and Date of Birth that you provided to your county below. Please contact your county if you have any questions." There are two input fields: "E-mail Address:" and "Date of Birth:". A blue "Submit" button is located below the "Date of Birth" field. At the bottom of the page, there is a small disclaimer: "C4Yourself® is a registered trademark of California Statewide Automated Welfare System (SAWS) Consortium IV Joint Powers Authority. Read our [Privacy Statement](#)."

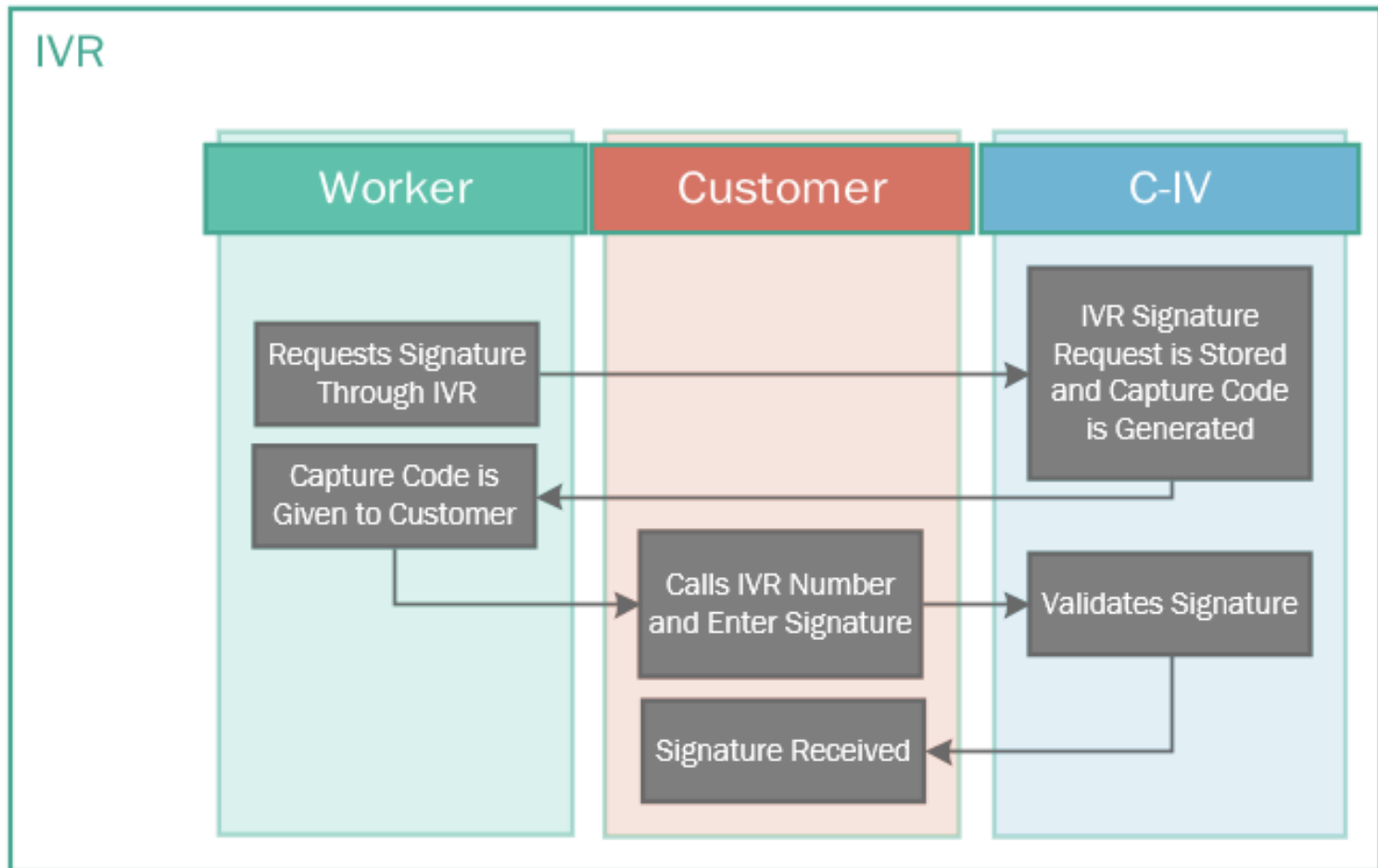
The screenshot shows the C4Yourself website interface after a submission. The header is identical to the previous screenshot. Below the header, the page title is "Electronic Signature". The main content area contains a confirmation message: "Your submission has been received." At the bottom of the page, there is a small disclaimer: "C4Yourself® is a registered trademark of California Statewide Automated Welfare System (SAWS) Consortium IV Joint Powers Authority. Read our [Privacy Statement](#)."

\*Note: The task will not be generated until the county admin set the automated action to active.



## Electronic Signature - IVR

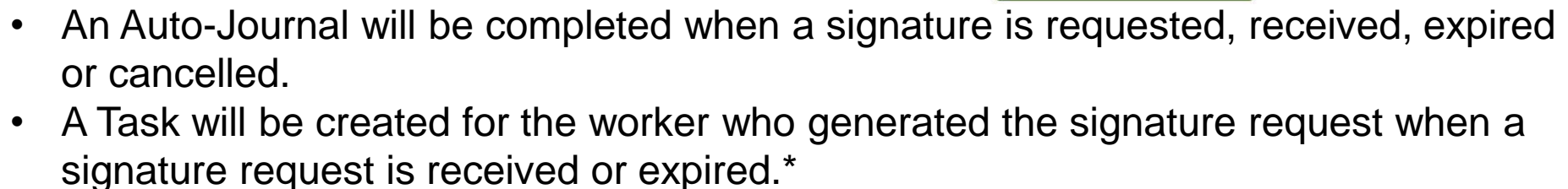
The interviewer will transfer to / provide an external phone number at the end of the phone interview for the applicant to call and complete their signature. The Customer will need to respond within 3 days.





```
graph TD; Start([?]) --> IVR[IVR]; IVR --> Welcome[Welcome to the Electronic Signature Telephone system]; Welcome --> Spanish[Para español, oprima 2.]; Spanish --> NI[Ni]; Spanish --> 2[2]; NI --> English[English]; 2 --> Spanish_IVR[TVR in Spanish]; English --> Main_Tel[Main_Tel ephonic]; Spanish_IVR --> Spanish[Spanish];
```

The flowchart illustrates the process for accessing the Electronic Signature Telephone system. It begins with a user (represented by an icon of a person at a computer) interacting with the system. The user is prompted to press a key to reach the IVR (Interactive Voice Response) system. The IVR system then displays a welcome message: "Welcome to the Electronic Signature Telephone system". The user is then prompted to press a key to access the system in Spanish: "Para español, oprima 2.". The user can then choose to press "NI" (No Information) or "2". Pressing "NI" leads to the "English" option, which then leads to the "Main\_Tel ephonic" option. Pressing "2" leads to the "TVR in Spanish" option, which then leads to the "Spanish" option.



11



# Electronic Signature Document Detail

Once all requested signatures are completed the electronic signature is complete and the worker will be directed to the Electronic Signature Detail Page.

- Signature History is displayed
- Signatures are given a unique ID.

## Electronic Signature Document Detail

[Close](#)

### Document Name

SAWS 2 PLUS

### Date Signed

Thursday, March 04, 2017 02:33:54:00 PM

### Signatures

ID	Name	eSign Name
ES-962142	Thelma Louise	Thelma Louise
ES-962143	Doogie Howser	Doogie Howser

### ▼ Signature History

#### Thelma Louise

Date/Time	Signature Capture Type	Value	Status	Expiration Date
03/04/2017 10:54 AM	E-mail	ThelmaLou@gmail.com	Received	03/04/2017
03/01/2017 09:59 AM	E-mail	ThelmaLou@gmail.com	Sent	03/04/2017

#### Doogie Howser

Date/Time	Signature Capture Type	Value	Status	Expiration Date
03/04/2017 02:33 PM	E-mail	TeachMeHow2Doogie@gmail.com	Received	03/04/2017
03/01/2017 09:59 AM	E-mail	TeachMeHow2Doogie@gmail.com	Sent	03/04/2017

[Close](#)



# Electronic Signature - Questions

